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TRENDS 2000

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Outdoor Recreation: An American Lifestyle Trend

NSRE 2000

NATIONAL SURVEY ON RECREATION AND THE ENVIRONMENT

***UNITED STATES' ON-GOING
NATIONAL RECREATION SURVEY***

LONG-TERM

TRENDS




1960:
Flower Children,
VW Camper Vans,
Elvis and The Beatles,
Vietnam, Kennedy,
Family Vacations,
Chevy Impala V8



In 1960

**The Outdoor Recreation
Resources Review
Commission found:**

- **“The simple activities are the most popular” – driving, walking, swimming, picnicking**
- **“Water is a focal point of outdoor recreation,” to sit by, swim in, ski across, and run boats over.**
- **“Outdoor recreation is a major leisure time activity and it is growing in importance,” 90% participated in the summer of 1960.**



2000:
INTERNET, STOCKS,
HONDA SUVs,
GORE/BUSH, WEALTH,
INTERSTATES, JOBS,
GROWTH, ADVENTURE
RECREATION

In 2000

The Forest Service RPA Assessment found:



- Outdoor recreation continues to be immensely popular, 97 percent age 16+ participate in 2000.
- The four most popular single activities are walking, going to the beach, family gatherings out-of-doors, and sightseeing.
- Almost all outdoor activities are forecast to grow in number of people participating and in travel.

Demographic Percentages: 1960 and 2000

		<u>1960</u>	<u>2000</u>
Residence in MSA		60.5	80.2
Over 1 million		26.1	21.4
Under 1 million		34.5	58.8
<u>Not</u> in MSA		39.5	19.8
Race	White	89.5	82.9
	Non-White	10.5	17.1
Age		<u>Male</u>	<u>Female</u>
All		47.9	52.1
12-17		7.3	7.0
18-24		5.3	6.2
25-44		16.6	18.1
45-64		13.4	14.3
65+		5.3	6.5
		<u>Male</u>	<u>Female</u>
		48.4	51.6
		5.3	5.0
		5.9	5.7
		17.9	18.2
		13.0	13.8
		6.3	8.9

(Continued)

Demographic Percentages: 1960 and 2000

Family Income (1998\$) (Note: 45.54 million U.S. families in 1960.
71.55 million families in 1998.)

Percentiles

20th

1960

2000

14,093

21,600

40th

24,298

37,692

60th

32,215

56,020

80th

44,547

83,693

95th

68,521

145,199

Educational Attainment, Age 25 and Over

8th grade or less

37.5

7.4

9-11th grade

18.5

9.7

High school graduate

27.1

33.8

Some college

9.1

24.7

College degree or higher

7.7

24.4

Varied Lifestyles

Varied Lifestyles

Activity	Percent Participating Regularly				
	North	South	Great Plains	Rocky Mtns	Pacific Coast
Crafts	27.2	27.3	27.8	32.3	30.4
Grow a garden	32.8	30.6	34.5	30.4	33.6
Eat out	37.9	50.6	43.0	44.7	44.6
Exercise	40.6	41.2	39.4	45.4	46.7
Follow sports	44.3	48.9	43.5	43.5	45.3
Raise kids	44.6	47.0	46.2	42.2	44.3
Attend church	46.5	57.3	49.7	44.1	36.0
Use computer at home	56.0	51.8	50.5	55.6	58.7
Care for pets	56.7	59.5	60.3	62.0	60.3
Recycle	75.9	52.4	64.7	54.3	77.1
Cook at home	79.9	76.9	80.4	84.0	84.5

The Changing American Society

- About 1 million new immigrants per year

- More people:

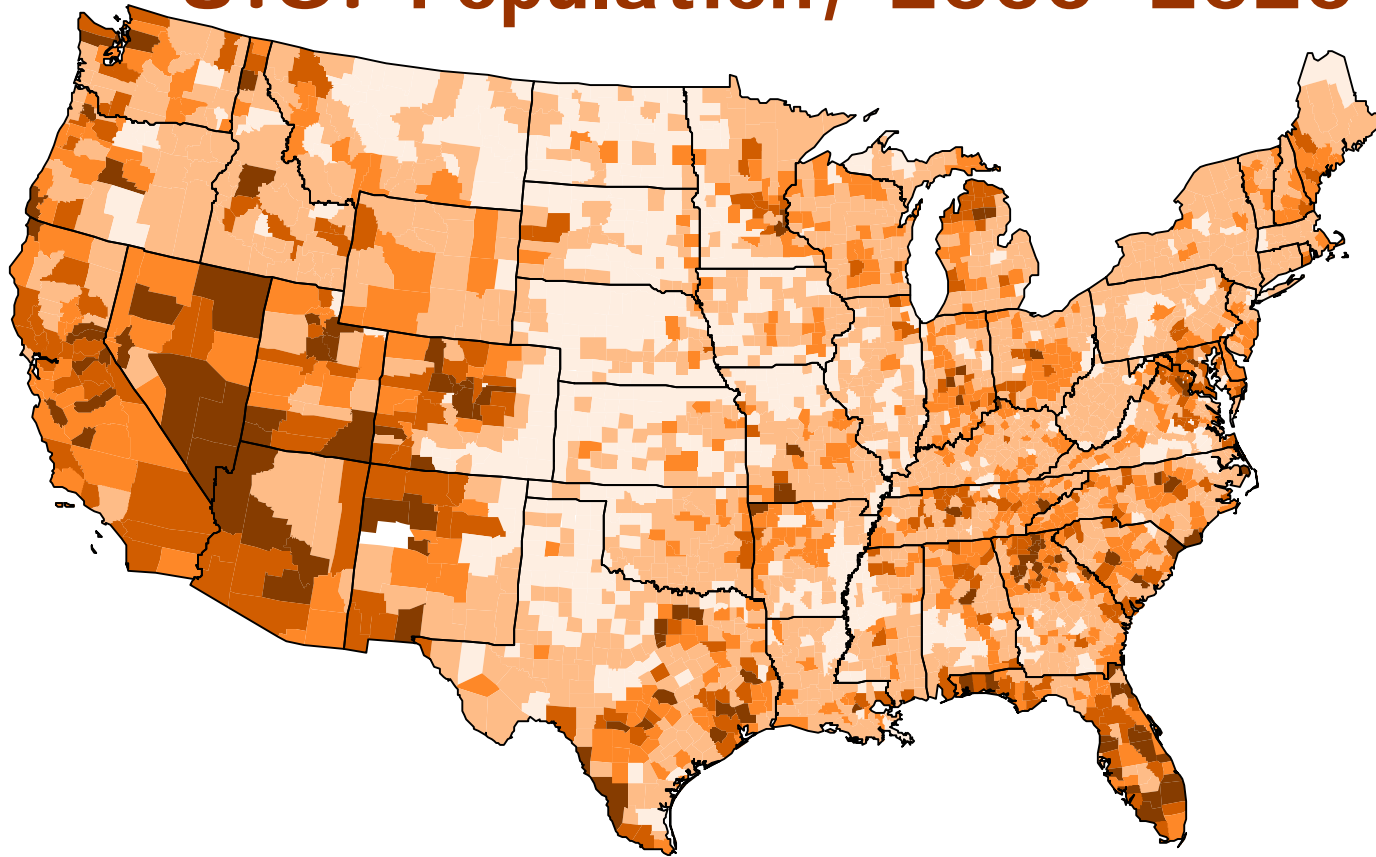
1990	248 mm
2000	275 mm
2020	325 mm
2050	404 mm
2075	481 mm
2100	571 mm

- Getting older: Median age 35→38 (by 2020)

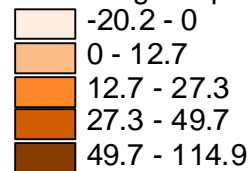
- Changing ethnicities by 2050:

Anglo Americans	76%→50%
African Americans	12% →15%
Hispanic Americans	9% →21%
Asian Americans	4% →11%

The Geography of Projected Change in U.S. Population, 2000-2020



Percentage Population Change

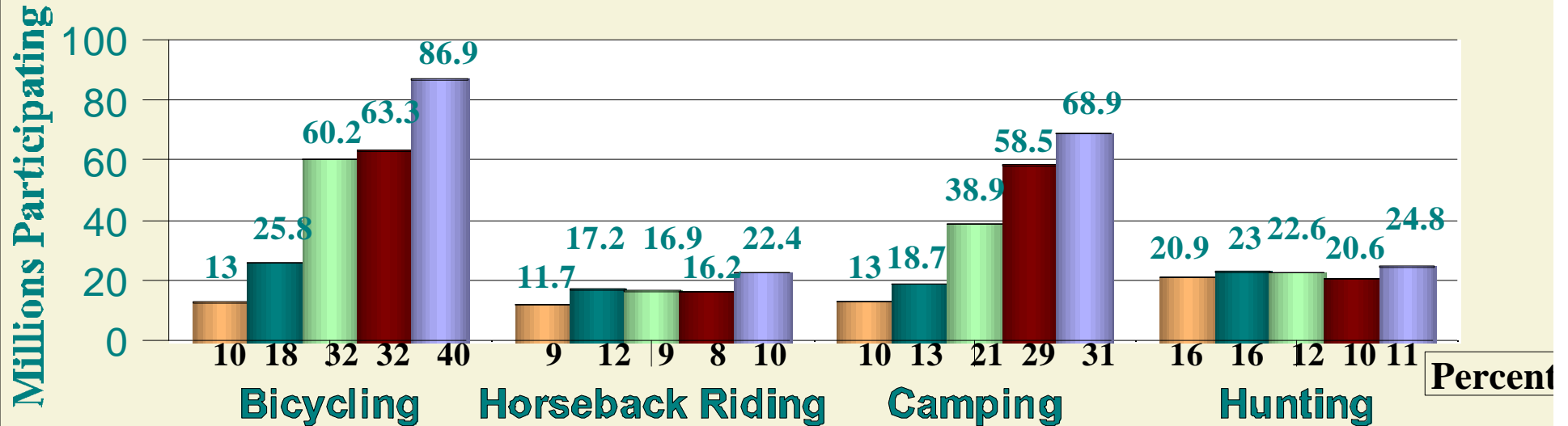


Percentage Population change by
Region and Conterminous U.S.

North	8.2
Pacific Coast	23.7
South	23.8
Rocky Mountains	28.5
Conterminous States	17.4

Long-Term Trends - Land

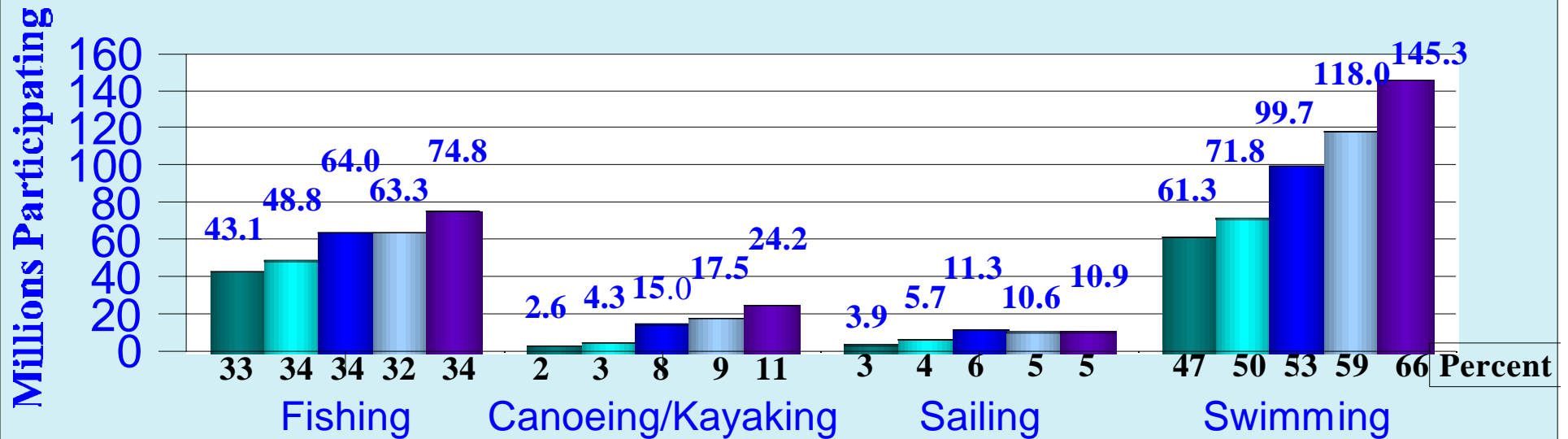
(12 or older)



- 1960 (131 million)
- 1965 (144 million, 10% more)
- 1982-83 (188 million, 44% more)
- 1994-95 (216 million, 65% more)
- 1999-2000 (220 million, 68% more)

Long-Term Trends - Water

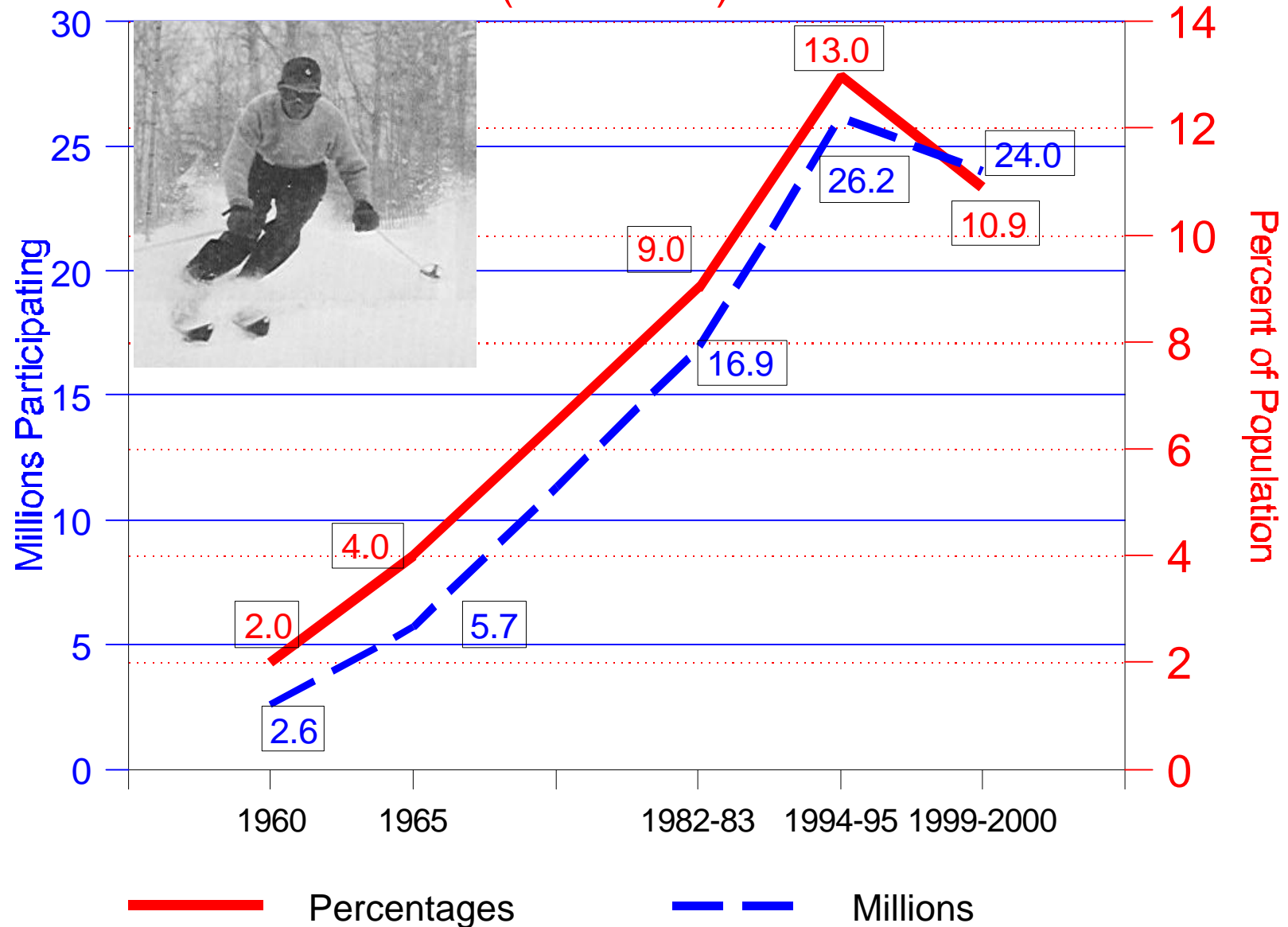
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- 1982-83 (188 million, 44% more)
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- 1999-2000 (220 million, 68% more)

Long-Term Trends - Snow

(12 or older)



RECENT

TRENDS



Activities Rising Fastest By Percentage (1982 to 2000) (16 or older)

	<u>% Growth</u>	<u>No. in 2000</u>
Bird watching	235.9	71.2
Hiking	195.9	73.1
Backpacking	165.9	23.4
Snow-mobiling	107.5	66.9
Walking	91.2	179.0
Off-road driving	89.2	27.9
Primitive camping	81.9	32.2
Developed camping	76.0	52.8
Downhill skiing	66.9	17.7
Swimming/river, lake or ocean	64.4	78.1



Activities Rising Slower By Percentage (1982 to 2000) (16 or older)

	<u>% Growth</u>	<u>No. in 2000</u>
Motor boating	52.9	51.4
Cross-country skiing	50.9	8.0
Bicycling	48.5	83.9
Sightseeing	40.2	114.0
Picnicking	37.5	116.6
Horseback riding	35.9	21.6
Fishing	20.6	72.5
Hunting	12.7	23.9
Outdoor team sports	10.6	46.9
Water skiing	9.4	17.4
Sailing	-0.9	10.5



Activities Adding the Most Participants (1982-2000) (16 or older)

	<u>Millions</u>	
	<u>Growth</u>	<u>No. in 2000</u>
Walking	85.4	179.0
Bird watching	50.0	71.2
Hiking	48.4	73.1
Swimming/river, lake, or ocean	36.4	92.9
Sightseeing	32.7	114.0
Picnicking	31.8	116.6
Bicycling	27.4	83.9
Developed camping	22.8	52.8
Motor boating	17.8	51.4
Off-road driving	17.3	36.7
Backpacking	14.6	23.4

Most Popular Activities in 1995

(Days during which participated)

	Millions
Walking	14,381
Bird watching	4,749
Visiting a beach or waterside	3,187
Pool swimming	2,439
Wildlife viewing	2,308
Biking	2,237
Sightseeing	2,036
Studying nature near water	1,353
Swimming in lakes/streams/ocean	1,241
Family gatherings outdoors	1,084

Shifts

- ➡ The average outdoor participant is changing; Fewer HS educated, <\$25K, from large households; More College educated, >\$50K, other races, and smaller households.
- ➡ People are remaining active in their chosen activities longer in life.
- ➡ Working parents mixing recreation with business travel, bringing family along.
- ➡ Increasingly American support “green” travel.
- ➡ Resurgence in interest in family travel.
- ➡ Use of RVs is booming.

Trips Away From Home For Outdoor Recreation (1995)

Land-Based

(Million)

Sightseeing	1,037
Family gatherings	778
Wildlife viewing	671
Biking	553
Hiking	434
Birdwatching	386
Off-road vehicles	369
Camping	197
Horseback riding	124
Big game hunting	116
Backpacking	68



Snow/Ice

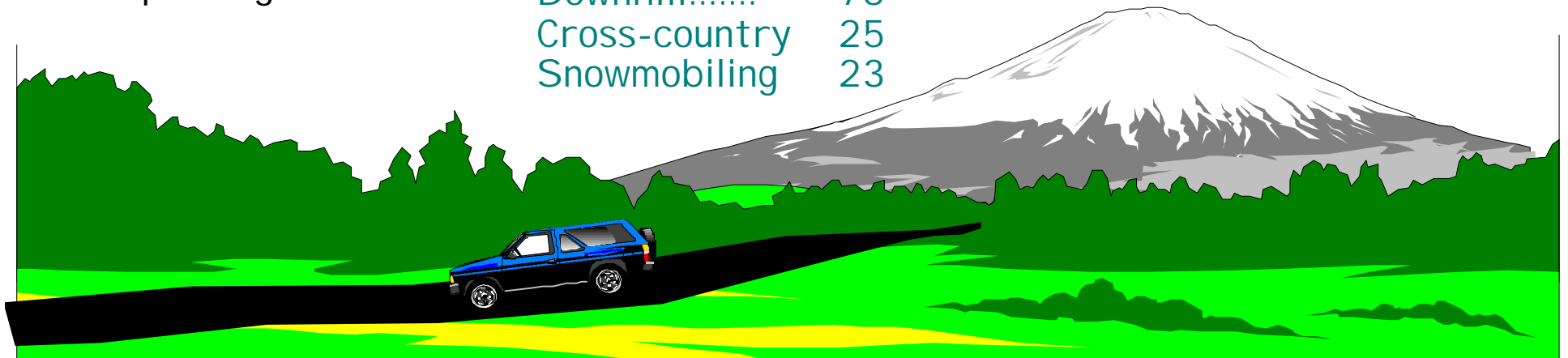
(Million)

Downhill.....	75
Cross-country	25
Snowmobiling	23

Water-Based

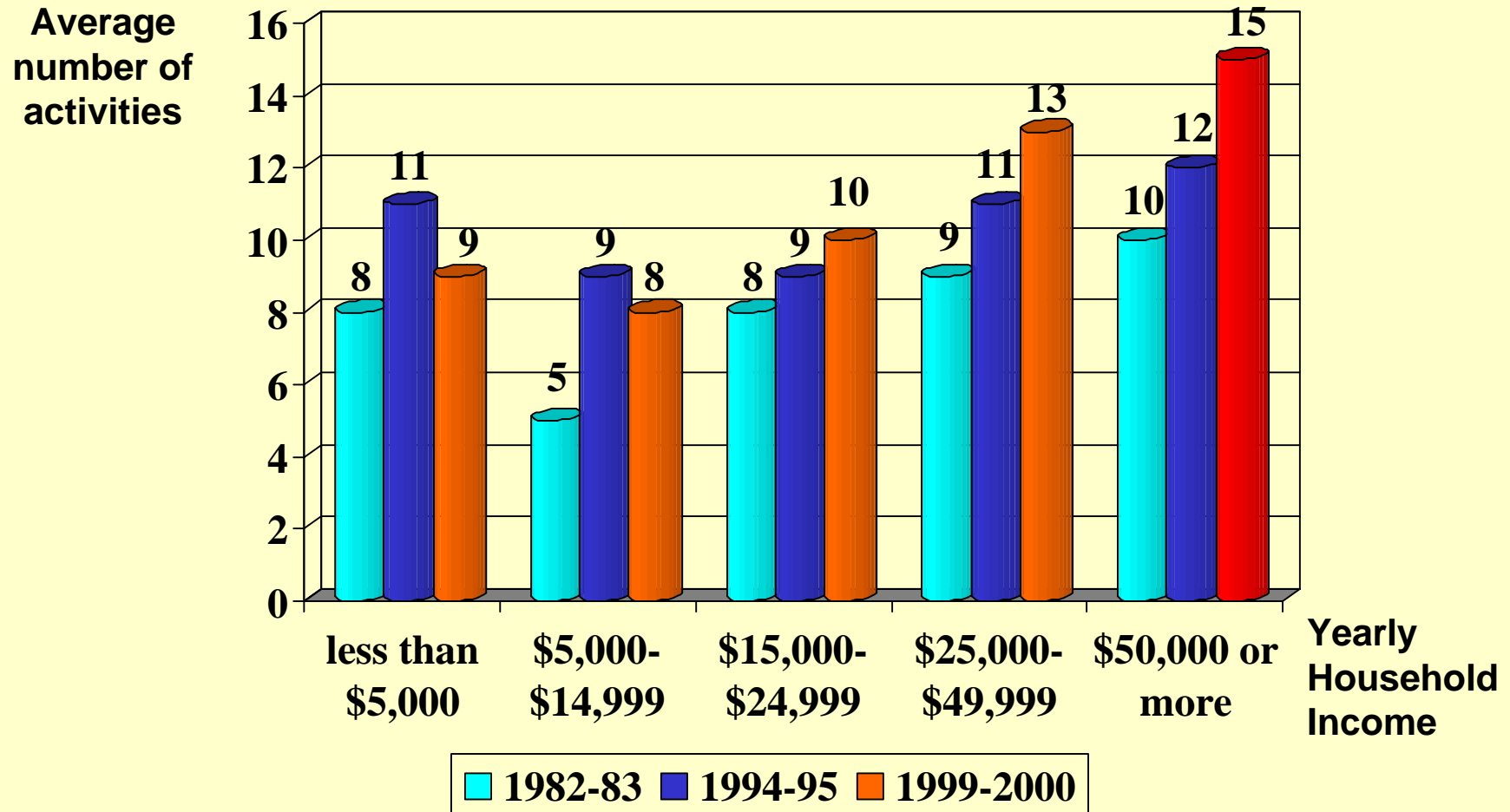
(Million)

Visiting beaches	1,438
Freshwater fishing	606
Swimming (stream/lake)	542
Saltwater fishing	165
Floating/rafting	47
Canoeing	39



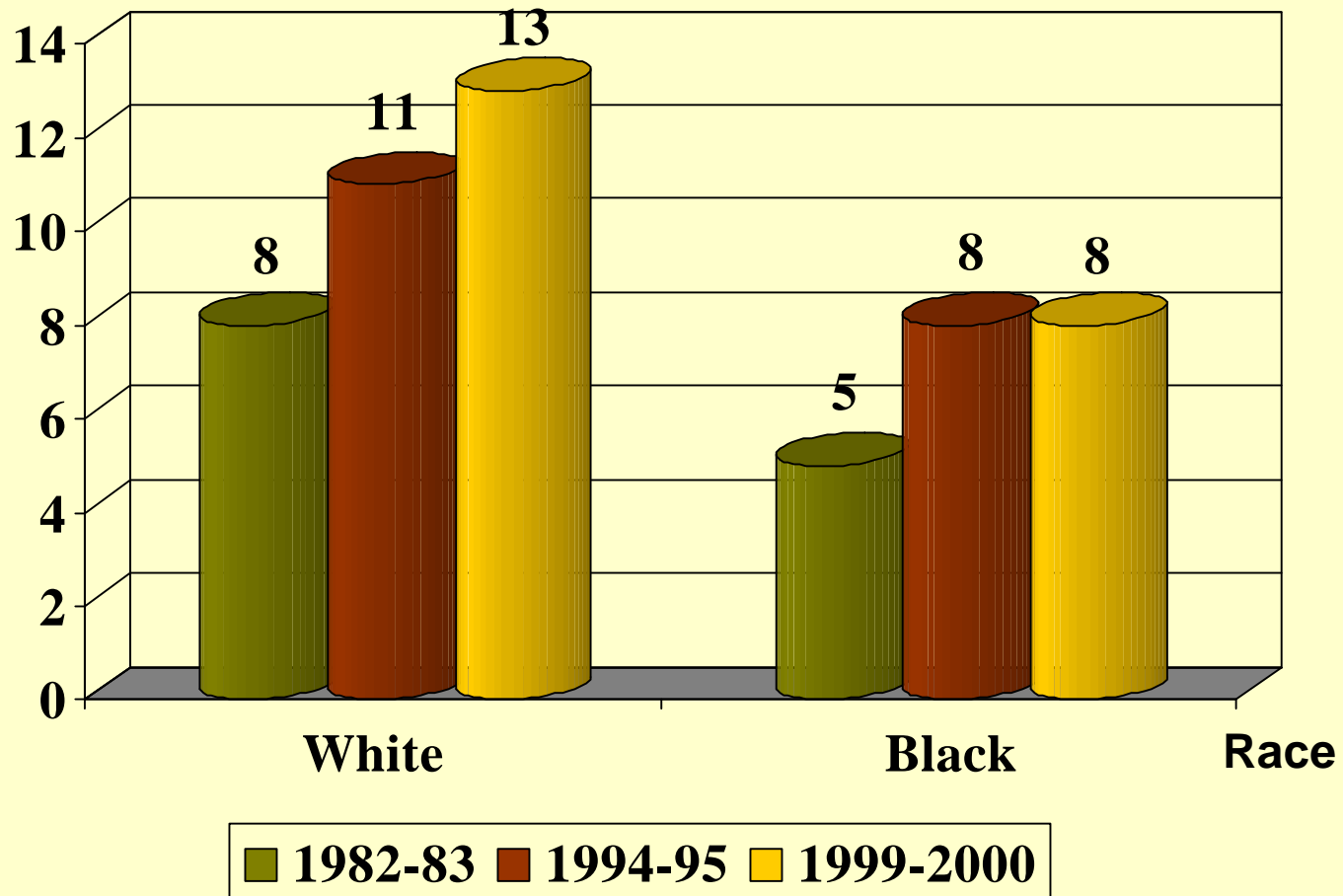
DIFFERENCES

Trends in Number of Activities



Trends in Number of Activities by Race

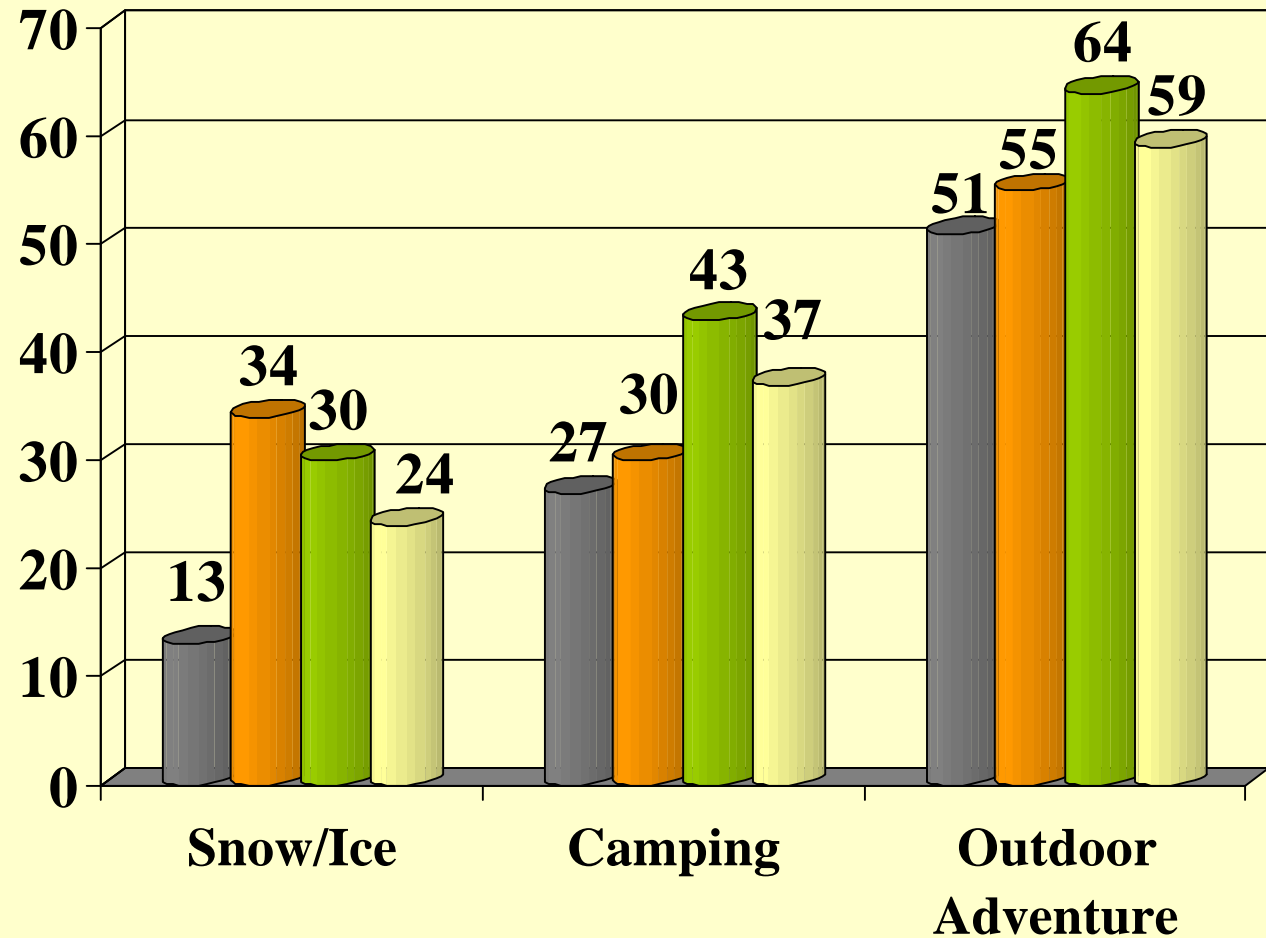
Average number
of activities





Regional Participation Differences in 2000 (Percentages)

Percent of Population 16+



■ South ■ North ■ Rocky Mtn/Great Plains ■ Pacific Coast

Regions Where Participants Reside

(Number of Participants)

Type of Activity	Millions of Participants				National
	South	North	Rocky Mtn./ Great Plains	Pacific Coast	
Trail/street/road	59.6	82.6	15.7	30.4	188.4
Viewing/learning	44.5	66.2	12.4	23.1	146.1
Camping	18.5	27.4	7.5	12.4	66.5
Hunting	8.8	9.6	2.9	2.1	23.7
Outdoor adventure	35.2	50.5	11.1	19.8	117.0
Boating/floating	23.6	35.3	6.7	10.8	76.5
Fishing	26.8	29.2	6.7	9.1	72.4
Swimming	40.1	57.6	9.2	21.2	127.4
Skiing/sledding/ snowmobiling	8.9	31.9	5.2	8.3	54.4
Outdoor team sport	14.6	21.3	3.9	7.4	46.9
Social activities	53.3	74.6	14.4	27.6	169.9

Participation Percentages by Race

Activity	Percentage Participating by Ethnic Group		
	Hispanic American	American Indian	Asian American
Bicycling	23.3	25.9	29.6
Walking	75.4	81.3	88.4
Visiting Nature Center	51.8	58.2	57.8
Bird watching	26.0	35.1	23.9
Sightseeing	32.5	62.9	55.7
Developed camping	22.8	29.9	22.6
Hunting	6.6	16.2	3.3
Fishing	24.9	42.1	16.8
Boating	21.9	41.0	31.0
Swimming in natural water	33.6	47.5	37.0
Hiking	47.2	34.1	33.8
Off-road driving	12.8	27.2	15.6
Picnicking	52.9	57.8	53.0
Family gathering	68.4	73.0	80.0

Participation Percentages by Residence

Activity	Percent Participating by Residence	
	Urban	Rural
Bicycling	41.0	33.4
Walking	84.7	82.8
Birdwatching	32.8	36.3
Sightseeing	53.4	54.8
Downhill skiing	8.8	6.4
Snowmobiling	4.6	7.5
Camping	34.6	30.5
Hunting	8.6	21.9
Fishing	31.6	44.0
Boating	35.7	37.4
Hiking	34.1	31.6
Picnicking	74.9	55.7
Family gathering	72.8	74.9

SEGMENTING

THE

RECREATING

PUBLIC

Segmenting Outdoor Recreation Participants

Outdoor Recreation Personalities

Sports Hogs

Individual and team sports

Winter sports

Boating and swimming

Sports spectators

Mountain and rock climbing

Nature Lovers

Walking and birding

Wildlife and fish viewing

Photography

Nature study

Fitness Buffs

Running and walking

Biking

Swimming

Do not hunt or fish

Outdoor Recreation Personalities (Continued)

Outdoor Avids

Fishing and hunting
Camping and boating
Family activities
Walking and hiking
Viewing/learning and
birding

King Fishers

Family gatherings/
the beach
Freshwater fishing

Passives

Family gatherings
Walking
Sightseeing/the beach

Do Nothings

Less than 1 percent participate

Outdoor Recreation Personalities

	Percent of <u>Americans 16+</u>
The Sports Hogs	9
Fitness Buffs	12
Nature Lovers	14
Outdoor Avids	10
King Fishers	13
Passives	21
Do Nothings	22

The Enthusiasts

(Most active one-third)

- Enthusiasts are the 1/3 of participants putting in the most activity days per year.
- Enthusiasts account for the majority of activity days:
 - 58 percent for caving
 - 92 percent for wildlife viewing
- Enthusiasts tend to be mostly:
 - Caucasian
 - Men
 - have \$25-\$75K incomes
 - live in 2-persons households
 - well educated and under 40

ENTHUSIASTS



Activity	This number of days per year or more	Percent of population	Percent of total days
Biking	30	7.4	80
Bird watching	50	9.1	91
Downhill skiing	6	2.6	74
Developed camping	8	6.3	76
Canoeing	4	1.8	73
Hiking	10	7.1	83
Off-road driving	14	4.5	87
Horseback riding (and others)	6	2.3	94

S U M M A R Y

- * As in 1960, outdoor recreation continues as a major part of Americans' lifestyles.
- * But, some things have changed.
 - * Birding, hiking, backpacking, snow mobiling, walking, off-road driving, camping, and skiing participants grew at much higher rates than population.
 - * Hunting, horseback riding, sailing, and fishing have grown slowly.
 - * Bird watching grew fastest of all activities tracked .
- * Equipment technology; rising popularity of risk/adventure; changing demographics; and rising incomes are shifting outdoor markets.
- * These market shifts are driven by population growth, immigration, aging, population diversification, income growth, rising leisure, cheap gasoline, and changing opportunities.
- * Of the 10 most popular activities, 4 focus on viewing and learning.

S U M M A R Y

(continued)

- * Travel is still very much a part of Americans' outdoor recreation.
- * Trends show continuing growth in viewing/learning recreation, accelerated growth in use of trails, strong interest in motorized activities, and continued participation in water and snow activities.
- * The number of people engaged in outdoor recreation in the East is three times the number in the West.
- * As demographics continue to change and as generations come and go, so too will the nature of outdoor recreation.
- * One market segment stands out, the ***ENTHUSIASTS***, who account for 60 to 95 percent of all participation days across activities.



**WHAT UNIQUE DO WE
HAVE TO OFFER?**

**A FABULOUS SYSTEM OF PARKS AND
NATURAL AREAS, UNRIVALED**

PROMOTE AND
PROTECT:
OUR GREATEST
CHALLENGE

Voting on the Most Important Issue

	First Choice	Second Choice
Reducing Crime	29	23
Reforming Health Care	22	22
Saving Social Security	21	21
Protecting the Environment	16	23
Reducing the Public Debt	9	10
Don't Know	3	1

Objectives for Managing Public Lands

Expanding access for
motorized vehicles (20%)

Developing trail systems for
motorized uses (29%)

Developing trail systems for
non-motorized rec. (57%)

Conserving/protecting
sources of water (91%)

Designating more
wilderness areas
(58%)

Developing paved
roads for cars (19%)

Preserving resources
through policies (75%)

Preserving wilderness
experience (74%)

Protecting ecosystems/
habitats (86%)

Increasing acres in
public land (53%)

Expanding commercial
recreation (28%)

Informing public on potential
environmental impacts (81%)

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